



Team Nelson Operating Agreement

This operating agreement serves as the guidelines and ground rules to help the team work most productively together. It will clearly define our expectations for each other and individual responsibilities. The TNOA is a living document and may be updated as the need arises. Any updates will be discussed with and ratified by the team members.

Team Communications

Everyone should be treated professionally and with respect. Property specifics and Sales Operation documents will be saved more efficiently. Duties and responsibilities of each team member are outlined here in order to eliminate confusion as to who is doing what.

Team Vision

Refine the interaction of the team members to identify and utilize individual strengths to improve the function and results of the team as a whole, and maximize team productivity.

Team Major Goals

- 1) XX OVs
- 2) XX Listings
- 3) XX% Territory Market Share
- 4) XX Sales – Min 10 in territory
- 5) \$X in Net Fees

2013 Year End Summary

- 1) XX OVs
- 2) XX Listings
- 3) XX % Territory Market Share
- 4) XX Originated Sales
- 5) \$X

Key Expectations and Understandings

James Nelson

1. XX% External / XX% Internal (OV, Marketing Material, PR Review)
2. XX Calls/Week
3. Face-to-Face Meetings: XX owners and XX influencers/Week
4. XX OVs – personally – with team doing another XX'
5. XX Top Client Events-
6. Referrals: XX Financing & XX Leasing (one a week) – also track external referrals
7. XX Speaking Engagements (X / month for 1st 8 Months of 1H13, 1 / Month for Oct – Dec 13)
8. Point Person on XX% of Listings
9. XX REW Round Table Events
10. XX Master List additions per week

Caroline Hannigan

1. XX% Internal / XX% External
2. Transaction Vouchers - as needed
3. CARTs - ongoing
4. Status Report- ongoing
5. OV and Listings Tracking - ongoing
6. Referral Tracking - ongoing
7. Mailings - ongoing
8. Offer Log - ongoing
9. Disclosure Forms – as needed
10. Listings Agreements - ongoing
11. Transaction Vouchers – as needed
12. Transaction Memos – as needed
13. Press Releases- as needed
14. Task Pad Management - ongoing
15. JNelson Email - ongoing
16. Email Blasts – as needed
17. MK Site Listings Checkin – monthly
18. Nelson Report – monthly
19. Village Biannual Report - (1H and YE)
20. XX Calls / Week
21. Networking Events – XX/ week
22. Review MK site monthly for any listing updates/removals
23. XX OVs
24. Point Person on XX% of Listings

Mitch Levine

1. XX% External (Client interaction, territory, investor) / XX% Internal (OV Review / Comps / Development of Marketing Materials) / 10% Business Development
2. Setups & Brochures - as needed
3. OV Review with Analysis - ongoing
4. Point Person for XX% of Listings
5. Manage Sub-territory (Contact All Owners 2X/year)
6. XX Calls/Week
7. XX OVs
8. Meetings/Networking: 2/week

Matt Nickerson

1. XX% External (Client interaction, territory, investor) / XX% Internal (CAs, Project Logs) / 20% Business Development
2. Create Confidentiality Agreements
3. Log/Track Confidentiality Agreements
4. Team Nelson Monthly Listings - 1st of Month
5. 1031 Log and Follow-up VI. DHCR Letters & Packets
6. Point Person for XX% of Listings
7. Manage Sub-Territory (Contact All Owners 2X/year)
8. XX Calls / Week
9. XX OVs (XX in the territory)
10. Meetings/Networking: 5/week

David Shalom

1. XX% External (Client interaction, territory, investor) / XX% Internal (OV Review / Comps / Development of Marketing Materials) / XX% Business Development
2. Setups & Brochures - as needed
3. Sharefile
4. MKSS E-blasts & Loopnet Blasts
5. Point Person for 10% of Listings
6. Manage Sub-territory (Contact All Owners 2X/year)
7. XX Calls/Week
8. XX OVs IX. Meetings/Networking: 2/week

Brandon Polakoff

1. XX% External (Tour / Broker Management) / XX% Internal (Reports, Offer Log, Master List, Tour Scheduling) / 10% Business Development
2. Tour Log
3. Schedule Tours
4. Written recarp of all tours to Point Person
5. Client Reports
6. Outside Broker Listings - Weekly
7. Social Media – JN Twitter and LinkedIn
8. Brochure Shelf – work with Interns to ensure it is always stocked & updated

Matthew Tarpley

1. XX% Internal (Underwriting OVs, Marketing Material Development) / XX% External (Networking)
2. OV's
3. OV Review with Mitch
4. Post Listings on MK, LoopNet, CoStar, RealProspect, ResNYC, Trulia, StreetEasy, Zillow
5. Setups & Brochures
6. Log OVs in MKSS 4
7. Comps & Transfers
8. Update Setups, Brochures, Property Notes, and Off Market Property Notes folders
9. Networking – YMWREA & YREPNY events
10. XX Master List additions (through networking)

Wilfred Yenko

1. XX% Internal (Marketing Material Development)
2. Brochures & Setups
3. Presentations – as needed
4. Postcards
5. Miscellaneous Projects